

# Part I Project Submission Overview

This document is intended to assist Approved Vendors in successfully submitting projects to Illinois Solar for All by giving an overview of requirements and supporting documentation needed during the Part I submission process. This document is not meant to be a comprehensive description of program requirements, and it should be used in conjunction with the Approved Vendor Manual. Additional resources and training videos with detailed instructions on how to submit a project in the ILSFA portal are available on the [Illinois Solar for All website](#). Your assigned Vendor Manager can provide further guidance or clarification on the Project Submission process.

## Introduction

Illinois Solar for All (ILSFA) was created under the Future Energy Jobs Act in order to provide access to solar for income-eligible and environmental justice communities. ILSFA REC values are higher than Illinois Shines to help offset higher development costs and overcome market barriers for these communities. This document is intended to help Approved Vendors successfully submit projects that meet program requirements and ensure project applications are in a standard format to facilitate a more efficient review by the Program Administrator.

## UPLOADING FILES IN THE VENDOR PORTAL

The project review process goes most efficiently when Approved Vendors use the following naming convention. This helps the project review team identify files, distinguish between different versions, and reduce back-and-forth communications to clarify file status or content.

Filename structure: [Project ID#]\_Document Type YYYY\_MM\_DD

e.g. P-0051\_Site\_Plan\_2019\_06\_13

After creating a project in the Vendor Portal, a unique Project ID number is generated and appears in the projects list, in the Project ID column. Section 8.4 of the Approved Vendor Manual lists the documents that Approved Vendors will upload. PDF files are the preferred file format for most uploads, but the system will also accept Word documents and image files such as JPEG, TIFF, BMP, or PNG.

Additional resources:

Approved Vendor Manual



Past Approved Vendor trainings can be found on the website

Your Approved Vendor manager is available to answer questions and help you through the project submission process

## Project Entry

To initiate project entry, use the “Add Part I” button in the Vendor Portal. This step captures basic information about the project, and is where the attachments for System Design, Customer Contracts, and Certification and Consent (BIF-Basic Information Form) forms are uploaded.

A selection is required regarding Prevailing Wage Attestation (either "...subject to requirements of the Prevailing Wage Act..." or "...an exception to the Prevailing Wage Act...". Additional information can be found in Section 15.7 of the Approved Vendor Manual.

## Site Suitability

✓ Residential Solar ✓ Non-Profit and Public Facilities ✓ Community Solar

After project entry is complete, the Approved Vendor selects the project by clicking on the hyperlinked address in the Project Location column in the project view/list. The project opens and allows the Approved Vendor to enter the Part I Site Suitability Report, upload site photos, and indicate whether mitigation is required to make the site suitable for a PV system. System Requirements, including details on system expansions, co-location, and shading studies, are fully detailed in Section 10 of the Approved Vendor manual, and additional information on site suitability can be found in Section 14.2.

View the Site Suitability report.

This document gives the Approved Vendor Manager reviewing a project an idea of what work, if any, is needed to make the proposed site suitable for a PV installation. The Approved Vendor Manager evaluates it along with submitted site photos. Photos should include (as applicable):

- The overall roof condition.
- The roof components, including rafters, surface components and materials, and other elements that support the mitigations indicated.
- The condition of the electrical panel.
- Work areas are clear of hazardous materials.
- Conditions of ground mount site (if applicable).

### If mitigations or improvements are needed:

- Mitigation plans are presented in enough detail to address the issue present.

- Mitigation plans should not place an undue financial burden on the property owner. If the property owner will be paying for the repairs, please direct them to the Program Resources Guide or the Home Repairs and Upgrades External Funding List.

**For all site suitability documents:**

- Attestations are completed, and the document is signed and dated by the Approved Vendor and the property owner.

**Requirements for systems already energized prior to application:**

- GATS or M-RETS unit ID
- Document Upload: ComEd Customers: signed Certificate of Completion, including project information
- Document Upload: Ameren Customers: Permission to Operate Packet (PTO) comprised of two approval emails from Ameren Illinois indicating approval to energize and operate
- Document Upload: Other utilities and coops: signed Certificate of Completion (CoC) and supporting documentation as needed to tie to the RS facility.
- Document Upload: Net Metering Application Approval Letter (if applicable)

## System Design

The System Design subsection asks the Approved Vendor to upload a shading study, e.g., Helioscope, Aurora, or another platform, to demonstrate the site's solar window, along with the chosen method of REC calculation and Alternate Capacity Factor if selected. The Alternate CF uses solar design software (chosen by the AV) and the actual system design to determine the predicted First Year Annual Generation. This will be the most accurate and is able to account for shading objects and optimizers.

The Alternate CF is calculated by:

$$\text{Alternate CF} = ((0.9657) * (\text{Estimated First Year Production})) / ((\text{System AC Capacity in kW}) * (8760))$$

Where:

- 0.9657 is a factor to convert the first-year production to the average year (to factor in the 0.5% degradation each year over the 15-year REC term)
- Estimated First Year Production is the value from the solar design software
- AC System Size, in kW, is the sum of all rated inverter maximum AC outputs
- 8760 is the number of hours in a year

The Approved Vendor selects the “Add Arrays” button within the System Design section to provide details on the system array(s). System Design is comprised of the following four (or five) elements:

### 1. SITE PLAN

- The address in the site plan matches the address you have entered in the vendor portal.
- The plan includes property lines, array locations, equipment, obstructions, and the point of interconnection.
- The plan indicates whether the system is co-located.

### 2. STRUCTURAL PLAN

The structural plan requirements for the Part I project submission are minimal. More details are required for Part II project submissions. However, structural plans submitted at Part I should include:

- Racking system engineered drawings or manufacturer cut sheets showing UL listing.
- Mounting or anchoring system information, including engineered drawings or manufacturer cutsheets showing UL listing.

### 3. SHADING STUDY

An array may qualify for “no shading” and use the PV Watts factor for production estimates when site photos demonstrate there are no obstructions to the South, East, and West that are within two (2x) times the height of the array. For sites that do not qualify for “no shading”, a shading study must be submitted, and an alternative capacity factor **must** be used.

- Professional software such as Helioscope, PVSys, or Aurora has been used to generate the report, or it is generated by a person who is qualified to perform shading studies.
- Obstructions are clearly indicated in the model and accurately represented. These can include trees, utility poles, different roof heights, air conditioning units, vent stacks, etc. Obstructions cannot be closer than twice the height of the obstruction in relation to the array to qualify for “no shading.”

### 4. ONE - LINE DRAWING

- Drawing includes module and inverter specifications, wiring and conduit schedules, overall system layout, design, size, and any other relevant information or notes.

### 5. SYSTEMS WITH BATTERY BACKUP

- For systems that include a battery, a detailed schematic must be provided showing that either only solar-generated power can be used to charge the battery, that the

battery's output does not run through the meter used to measure solar output, or that a password-protected software setting is enabled for the duration of the project's participation in ILSFA that prevents the battery from charging via line power.

## Other Required Documentation

### INTERCONNECTION AGREEMENT

Interconnection agreements are required for all sub-programs, other than Community Solar, projects with a nameplate capacity of greater than 25 kW AC.

- The interconnection agreement must be signed by both the utility and the interconnecting customer (or, if applicable, their Approved Vendor or installer).
- The agreement must have the correct site address and, to be considered through the project selection protocol (if applicable), be fully executed (signed) and dated prior to the close of the project submission window and submitted before the cure period ends.<sup>1</sup>

### MWBE SUBCONTRACTOR CONTRACT (FOR PROJECT SELECTION POINTS)

If the subcontractor is contracted for 50% or more of the REC contract value and is a certified MWBE, the project may receive points as part of project selection. See the Project Selection Protocol for details.

- The check box in the project application section of the vendor portal must be checked.
- The contract uploaded must be signed by all parties.

### PREVIOUSLY USED EQUIPMENT

Previously used equipment may only be used if a) the Approved Vendor is able to demonstrate that it is providing a warranty equal to that which would be available for the same equipment if it were new and b) demonstrate to the Program Administrator that the participant has been informed of, and agrees to, the use of used equipment prior to installation.

- Document Upload: Previously Used Equipment Acknowledgement Form (form must be completed prior to installation)

## Consumer Protections

✓ Residential Solar ✓ Non-Profit and Public Facilities ✓ Community Solar<sup>2</sup>

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<sup>1</sup> Exceptions will be made for projects that were forced from the utility interconnection queue due to the utility's queue management process. These projects need only demonstrate that they exited the interconnection queue involuntarily and have subsequently reapplied for interconnection.

<sup>2</sup> Please note that community solar disclosures are completed at Part II.

## SIGNED DISCLOSURES AND BROCHURES

Disclosures should be generated through the Approved Vendor portal and e-signed (they may be printed and wet-signed by the customer, but disclosures not generated through the portal should be submitted with a Savings Calculator<sup>3</sup>). To upload a wet-signed disclosure, create a scanned PDF of the signed disclosure form and select the button labeled “Upload Disclosure PDF” towards the top of the project detail action menu. Savings calculators may also be uploaded using the “Upload Disclosure PDF” button. Income-Eligible Residential Solar participants must receive the disclosure a minimum of seven days before signing the contract.

- Disclosure terms must match the contract.
- Disclosures and contracts must meet program requirements, including:
  - No upfront costs (this does NOT apply to NP/PF and Residential Solar (Large) projects).
  - Minimum savings requirements of at least 50% and at least 65% for non-profit/public facilities sub-program projects where the PV system is owned by a third party that utilizes the federal Investment Tax Credit.
  - System is warranted for minimum of 15 years, including Energy Sovereignty projects.
  - Maintenance is provided for at least 15 years at no cost to the customer, including Energy Sovereignty projects.
  - No liens on the property.
  - Forbearance provisions are included.
  - Energy price escalation rates do not exceed 1.7% per year.

Additional information about Consumer Protection requirements can be found in Section 7 of the Approved Vendor Manual and the [Consumer Protection Handbook](#).

Select the check box indicating whether or not this is an Energy Sovereignty (ES) project. If it is ES, then enter the Date of Ownership Transfer. Details regarding ES can be found in Section 1.3.2 of the Approved Vendor Manual, with additional details included in each sub-program outlined in Section 2.

## Customer Contract Review

✓ Residential Solar ✓ Non-Profit and Public Facilities ✗ Community Solar<sup>4</sup>

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<sup>3</sup> Savings Calculators can be found under the Eligibility Tools and Forms drop down menu on the Current Approved Vendors page.

<sup>4</sup> Customer contracts may be requested by the Program Administrator at Part II application for Income-eligible Community Solar projects.

- Contracts need to be signed and dated by both the customer and the Approved Vendor.
- Customer details (such as name and address) and terms must match the disclosure and give the customer the right to cancel within 14 calendar days of executing the contract.
- PPA and lease agreements have a minimum term of 15 years.
- Upload to the vendor portal the completed Contract Checklist document for each project.

## Community Solar Project Eligibility

✗ Residential Solar ✗ Non-Profit and Public Facilities ✓ Community Solar

### COMMUNITY ENGAGEMENT NARRATIVE

For all community solar projects, a community engagement narrative must be submitted. This narrative should show efforts in gathering community support at a local level, which must include a list of community-based organizations.<sup>5</sup> (as defined in Section 8.6.2 of the Revised Plan) The applicant has partnered with the location of, development of, and participation in the project, as well as regarding the priorities and concerns of LI community members. It should be detailed and mention specific events, actions taken, and partnerships made. Details can include:

- Specific events, meetings, or engagements already conducted in support of your proposed community solar projects.
- Details on event agenda, content, attendees, materials, and information shared and presented.
- Specific partnerships established and partner roles. This can include letters of support for the project from partners or community groups to verify the partnerships.

### ANCHOR TENANT LETTER OF INTENT (IF APPLICABLE)

This only applies to an anchor tenant (for up to 40% of the nameplate capacity of the project).

- A Letter of Intent (LOI) indicates an agreement between the AV and the qualified anchor tenant to subscribe to the community solar project and accept up to 40% of the project's nameplate capacity.
- LOI must be signed by an authorized representative of the anchor tenant.

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<sup>5</sup> A public entity may qualify as a community-based organization for this purpose, but only if the public entity meets the requirements as set out in Section 4.3 of the Approved Vendor Manual.

## ANCHOR TENANT TAX DOCUMENTATION (IF APPLICABLE)

- Tax documentation, such as a 501c3 approval letter from the IRS that demonstrates the anchor subscriber is either a non-profit or a public facility, must be submitted.

## PROOF OF SITE CONTROL (ALL PROJECTS)

- Can be demonstrated through a land lease agreement, a written binding contract, an option, an award notification of an RFP response issued by a public entity or facility, or similar documentation.

Additional information on Community Solar project eligibility can be found in Section 4.3 of the Approved Vendor Manual.

## Financial Requirements

✓ Residential Solar ✓ Non-Profit and Public Facilities ✗ Community Solar<sup>6</sup>

The program requirements stipulate that there be no upfront costs for Residential Solar projects and that first-year and ongoing customer savings be at least 50% of the value of the energy produced by the system.

For Non-Profit/Public Facilities, the Approved Vendor must select the “yes” checkbox in the Project Information section of Part I submission if that project’s owner will apply for the federal Investment Tax Credit. If applying for the Investment Tax Credit, the savings level for the participating host of the project must then be 65% of the energy value rather than 50%.

## SAVINGS CALCULATOR

- The savings calculator has been filled out using the system design and matches the disclosure and the customer contract.

## CUSTOMER BILLS

For Residential Solar projects using non-standard customer rates or for Non-Profit/Public Facilities:

- To establish the Net Metering Rate using customer bills, use the average of 12 consecutive months of customer bills within the last two years.

## Participant Eligibility

✓ Residential Solar ✓ Non-Profit and Public Facilities ✓ Community Solar<sup>7</sup>

Approved Vendors must collect and share data for all program participants with the Program Administrator to verify participant eligibility. This includes all property owners, single-family

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<sup>6</sup> Financial savings requirements apply to all three sub-programs, however Community Solar project applications do not require savings calculator and customer bills at Part I submittal.

<sup>7</sup> Certification and Consent forms come in Part II applications for Community Solar individual subscribers while the anchor subscriber Certification and Consent form should be submitted in Part I.

occupants, tenants of multifamily properties counting toward eligibility (minimum is 50%), all subscribers to community solar projects, and all non-profit or public entities receiving benefits through ILSFA-energized systems. Approved Vendors upload the completed Certification and Consent Form (Basic Information Form) by selecting the “Add Recipient Verification” button in the action menu toward the top of the project page. This opens a page where the Approved Vendor selects the applicable project type and enters information about the participant, uploads the Certification and Consent form as a PDF. Ensure all personal information has been redacted, such as Social Security Numbers, account numbers, and ID numbers. Names, addresses, and partial date of birth (MM/YYYY) must be shown.

✓ Residential Solar ✓ Non-Profit and Public Facilities ✗ Community Solar<sup>8</sup>

The eligibility requirements are based on household income or location in an Environmental Justice Community or income-eligible community, as well as property ownership requirements. Income-eligible requirements stipulate that participants must meet the threshold of 80% or less of the Area Median Income. A full list of what qualifies as income can be found in the Approved Vendor Manual, section 6. The Residential Solar Participant Referral program allows Approved Vendors to submit a standard offer for 1–4-unit buildings, which will be shared with Program Administrator screened participants. The Program Administrator conducts a verbal pre-screening for income and initial site eligibility before sharing information with the Approved Vendors. If Approved Vendors want to participate in this program, they must also agree to adhere to additional consumer protections.

Interested participants can choose to have their income verification performed by the Program Administrator before or after participating in the referral process, at the participant’s discretion. Participants can also choose to have their income verification completed by the Approved Vendor of their choice. There is a tiered approach for participant income verification, which ensures the least invasive methods are tried first until income eligibility is determined. Full methods are described in the Approved Vendor Manual Section 6.

Method A: Third-Party Qualifying Program Verification

Method B: Tax Transcript Verification

Method C: Tax Returns or Pay Stubs

## **RESIDENTIAL SOLAR PROJECTS : PARTICIPANT INCOME VERIFICATION**

### **1 - UNIT / SINGLE - FAMILY**

Submit a Certification and Consent (Basic Information Form) for the household and

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<sup>8</sup> Participant Eligibility requirements apply to all three sub-programs, however verification of participant (subscriber) eligibility for Community Solar projects is not required until the Part II application is submitted.

- Submit supporting documentation for one of the methods A-C through the Approved Vendor portal.

#### **2 - 4 UNIT**

For two- to four-unit buildings, at least 50% of the residential units must verify they are 80% or less of AMI.

- Submit a Certification and Consent (Basic Information Form) for all residential units in the building, which count towards eligibility, and
- Submit supporting documentation for the selected methods A-C through the Approved Vendor portal.

#### **5+ UNIT**

Income verification for a larger multi-family building can occur by using either of the following methods:

- 1) Verifying at least 50% of the households as having an income of 80% or less of AMI, or
- 2) Whole Building Certification
  - o The property qualifies for either the US Department of Housing and Urban Development Project-Based Vouchers or Project-Based Rental Assistance,
  - o The property meets the definition of Affordable Housing under the Illinois Affordable Housing Act, or
  - o The property qualifies for Income-Eligible Multifamily Energy Efficiency Programs.

If demonstrating eligibility based on 50% of the households verifying their income as 80% or less of AMI:

- Submit a Certification and Consent (Basic Information Form) for all residential units in the building that count toward eligibility.

If demonstrating eligibility through whole building certification:

- Submit either rent rolls (which include the number of bedrooms in each unit) or documentation of current enrollment in one of several programs as outlined in the Whole Building Certification and Consent (BIF)

### **ADMINISTRATOR INCOME VERIFIED PARTICIPANTS**

If a participant has been income verified by the Program Administrator, they will have received an Income Verification Confirmation Notice. This notice will include their Recipient Verification ID number and the Approval Date. Income Verification expires six months from the approval date.

- On the “Add Recipient Verification” page, select “Add an Existing Recipient Verification” and then enter the Recipient Verification ID to associate an income-verified recipient with your project.

### **NON-PROFIT AND PUBLIC FACILITIES PROJECTS: PARTICIPANT ELIGIBILITY VERIFICATION**

Non-Profit and Public facilities projects qualify based on: 1) status as a critical service provider for the community, 2) the project being located in either an environmental justice or qualified income-eligible community or adjacent census blocks, and 3) demonstrating community engagement with sufficient connection to and input from community members.

### **FOR ALL NON-PROFIT/PUBLIC FACILITIES PROJECTS:**

- Submit a Non-Profit and Public Facilities Certification and Consent (BIF) through the portal.
- Submit Tax documentation such as a 501c3 approval letter from the IRS that demonstrates the occupant is an eligible non-profit or public entity.

### **IF THE NON-PROFIT ORGANIZATION IS NOT THE OWNER OF THE PROPERTY:**

- Submit a Qualified Tenant Agreement signed by the property owner.

### **LOCATION REQUIREMENT:**

The property may qualify either by being in an Environmental Justice or an Income-eligible community, or adjacent census blocks.

- Use the Illinois Solar for All Environmental Justice Community Mapping Tool to verify that the property resides in an Environmental Justice community, or:
- Use the Illinois Solar for All Income-Eligible Community Mapping Tool to verify that the property resides in an Income-Eligible community.

Communities may apply to [self-designate](#) as Environmental Justice communities. Note that the review of self-designation applications can take time, so applications should be submitted well in advance of project submission windows.

### **ORGANIZATION ELIGIBILITY:**

Project participants’ eligibility must be verified through BOTH of the following criteria:

### **DEMONSTRATION OF COMMUNITY ENGAGEMENT:**

- Provide a narrative summary of efforts taken prior to the application to conduct community outreach and education about the proposed entity being served by this installation.
- List community-based organizations the applicant has partnered with (including letters from those organizations to verify the partnerships) in support of the proposed entity being served by this installation.

## CRITICAL SERVICE PROVIDER STATUS:

See section 4.2 of the Approved Vendor Manual for the full list of qualified Critical Service Providers (CSP). CSPs must offer a high degree of essential services to income-eligible or environmental justice communities. Organizations that are not on the list can be presented for consideration to the Program Administrator through the submittal of a CSP designation request to the Program Administrator prior to project submission. The Approved Vendor should present a narrative, with supporting documentation (data, reports, news articles, support letters, etc.), that explains what services are provided by the entity under consideration that should be considered critical services to an income-eligible or environmental justice community. Details of the CSP request requirements and process are presented in Section 4.2 of the manual.

Detailed Eligibility requirements for all sub-programs can be found in Section 4 of the Approved Vendor Manual.

## PREVAILING WAGE CONSIDERATION

If “House of Worship” is selected, and the project is 100 kW AC or less in size, the applicant will provide both of the following:

A signed attestation that states the following:

- I certify that my name is [CERTIFIER’S NAME] and that I serve as [RELATION TO THE ORGANIZATION] to/for [ORGANIZATION NAME]. I have direct knowledge of [ORGANIZATION NAME]’s use of the property at [ADDRESS]. As required under Section 1-56(b-15) of the Illinois Power Agency Act (20 ILCS 3855/) as amended by Public Act 102-0662, I further certify that the property located at the address above, the site of a proposed new photovoltaic project, qualifies as a House of Worship because it is used exclusively by a religious society or body of persons as a place for religious exercise or religious worship and is recognized as exempt from taxation pursuant to Section 15-40 of the Property Tax Code (35 ILCS 200/). I certify that these representations are true and complete to the best of my knowledge. I understand that these representations will be used for state government purposes and may be verified at any time by the Illinois Power Agency and that the Illinois Power Agency has the right to request documents and other evidence to verify this certification. I also understand that making misleading or false statements in an application for the Illinois Solar for All program may result in denial of the application or other consequences, including possible Program disciplinary action against an applicant, Approved Vendor, or its Designee.

Proof of exemption from taxation pursuant to Section 15-40 of the Property Tax Code (You can utilize a sales tax exemption form for this requirement).